



FPA First -- Nine Florida Chapters Form Financial Planning Association of Florida

“The Financial Planning Association® of Florida is a ground-breaking organization for FPA®,” says Charlie Fitzgerald. Unlike a large state chapter with individual members, FPA of Florida’s constituents are the nine chapters in Florida. The first of its kind in the nation, FPA of Florida serves as a model for other FPA chapters in the United States.

Five basic reasons for forming FPA of Florida:

Best Practices - to be a resource for chapter leaders and administrators so that each chapter may improve.

- By offering access to leaders dedicated to pioneering and sharing best practices in membership recruitment and retention, leadership development, chapter operations and finance, educational offerings and member services.

Public Relations - to promote the importance and benefits of financial planning.

- By coordinating programs and services that promote the financial planning profession and the Financial Planning Association to the citizens of Florida.
- By building relationship with State officials and regulators in Tallahassee.

Financial Literacy - to contribute to the education of the public, from school children to retirees, on financial topics that apply specifically to their particular stage of life.

- By encouraging member participation in FPA’s efforts with Junior Achievement to teach kids the financial planning process, their role in the economy, and the importance of education to their success in life.
- By encouraging member participation in FPA’s efforts with the AARP to help educate individuals 50 and over on the importance of financial planning.
- By assisting Florida’s Literacy Council in their efforts.

Leadership Training and Development - to effectively involve more chapter leaders in leadership training.

- By promoting utilization of FPA’s leadership tools that teach how to implement time honored leadership practices.
- By learning how to successfully develop strategies and energize effective alliances.
- By increasing participation in leadership functions.
- By utilizing proven methods and systems that can be employed in your chapter, in your work and in your personal life.

Single Voice to State Government - to be a single voice to State officials and regulatory agencies.

- By effectively communicating FPA’s positions on legislative and regulatory issues impacting the financial well-being of the citizens of Florida.
- By serving as a resource to elected and appointed officials.
- By involving our members in regulatory changes impacting the financial planning profession and the clients we serve.



I am excited about the very quick success and possibilities of FPA of Florida. I have been heavily involved over the years, at the national and local levels of various organizations and I have never seen the impact of any of those organizations on government that the FPA of Florida has already had – and in such a short period of time. I am impressed and hope to be able to help in the future.

Benjamin A. Tobias, CPA/PFS, CFP®, CIMA®
FPA of Broward County

Thanks to Our
FPA of Florida
Resource Partners



FPA of Florida Making An Impact -- *Being a Resource to State Government*

FPA of Central Florida Member Appointed to Florida's Financial Literacy Council

As a direct result of our efforts to make connections in Tallahassee, CFP® Professional Paul Auslander (FPA of Central Florida) has been appointed to Florida's Financial Literacy Council. The council was created to study the financial problems that affect Floridians, particularly young persons, seniors, working adults and small business owners, which arise from a lack of basic knowledge of financial issues. The council will also develop recommendations to aid Chief Financial Officer (CFO) Alex Sink's department-- the Department of Financial Services-- in developing programs and resources aimed at increasing financial literacy among Floridians.

"The mission of the Financial Literacy Council is on target with that of FPA -- to help all Floridians make informed financial decisions," says Auslander. "As financial planners, we want to help our clients achieve their goals and dreams. It's a natural fit, many of the programs that will be presented to the public mirror those being offered and developed by FPA."

New State Regulatory Council Being Formed

FPA members in Florida will soon be served by a new State Regulatory Council that will partner with the Florida's Office of Financial Regulation to comment on proposed rules and regulation changes that affect State Investment Advisors. Paul Auslander chairs this Council and is in the process of building his team.

Each FPA chapter in Florida is encouraged to submit recommendations for two or three members to serve on this advisory council. If you are interested in being nominated for this council, please contact your chapter president.



Congratulations on your continued efforts and success with developing connections with the Florida elected and regulatory leaders. We appreciate everything that FPA Florida is doing to advance the financial planning profession!

Marvin W. Tuttle, Jr., CAE
Executive Director/CEO
Financial Planning Association

FPA of Florida Is Active --

Bringing a Single Voice to State Regulators

FPA Day at Florida's Capitol in April

During the initial visit to Tallahassee on April 17, 2007, several members had the opportunity to introduce FPA of Florida to state representatives and officials. Pictured at right with Florida's Consumer Advocate Bob Milligan are Michael Zmistowski, Paul Auslander, Bob Milligan, Al Arntzen, Steve Athanassie, Mark Johannessen (FPA President - 2008), Julie Massaro (FPA Membership Director) and Charlie Fitzgerald.



Financial Planning Week 2007 Proclaimed

Attorney General Bill McCollum, Governor Charlie Crist, Chief Financial Officer Alex Sink, and Commissioner Charles Bronson hand Financial Planning Week resolution to FPA members Paul Auslander, Allen Arntzen, Claudia Sachs and Charlie Fitzgerald.

Creating Greater Awareness of FPA

Charlie Fitzgerald addresses Florida Cabinet members and the 100 plus having business before the Governor on September 19. Paul Auslander, Claudia Sachs and Al Arntzen look on. Charlie Fitzgerald recently gave testimony before the nine members of the Financial Literacy Council on October 10 on FPA's financial literacy initiatives.



Establishing Better Communications with State Regulators

FPA members Al Arntzen, Paul Auslander, Claudia Sachs and Charlie Fitzgerald visit with Chief Financial Officer Alex Sink before addressing the Cabinet Meeting.

FPA of Florida Making An Impact --

Leadership Development & Training

FPA of Florida Sponsors Multi-Chapter Conference November 30 & December 1

FPA of Florida will host the 2007 Multi-Chapter Conference at the Jacksonville Marriott Southpoint on November 30 and December 1. This dynamic and interactive two-day event is a must-attend event for chapter leaders interested in:

- strategic planning for 2008
- increasing membership
- improving chapter cash flow
- building in leadership succession
- establishing a greater community presence

Creating synergies between the FPA chapters in Florida is the basis of FPA of Florida. This conference affords chapter leaders an opportunity to work together on common problems and share ideas on how to deliver positive and meaningful membership experience.

If you have been looking for a place to share information and ideas, connect with your colleagues, and see what resources are available from FPA, then look no further. The Multi-Chapter Conference offers you the opportunity to increase skills related to board management, succession planning, administrative challenges and much more. Your participation in this program is an investment in your chapter's future!

Multi-Chapter Conference Essential Information

November 30 & December 1
Jacksonville Marriott Southpoint
4670 Salisbury Rd
Jacksonville, FL
(800) 962-9786

Conference Opens on Nov 30 at 12:30 pm
with registration & networking
Conference Ends on Dec 1 at 1:30 pm
Registration Fee is \$50 per chapter representative
Contact your chapter president if you are interested in
attending or call FPA of Florida at (866) 730-4530.



What a great honor it has been to serve my peers and be an instrumental part of leading our industry as we “co-create” the future of FPA. I recommend to all financial planning professionals who aspire to be a part of something great, to serve on the board of their FPA chapter.

Nassim H. Elias, AEP, CFP®
FPA of Northeast Florida

FPA
FINANCIAL PLANNING ASSOCIATION
OF FLORIDA

The Heart of Financial Planning™

12157 W Linebaugh Ave PMB 312
Tampa, FL 33626-1732
FinancialPlanningFlorida.org

U.S. Postage
PAID